



# CERTIFICATE OF APPROPRIATENESS & HISTORIC SITE TAX EXEMPTION APPLICATION

## HISTORIC AND CULTURAL LANDMARKS COMMISSION

CITY OF FORT WORTH, TX 76102 1000 THROCKMORTON (817) 392-8012 / Fax: (817) 392-8016

### 2008 HCLC Meeting Dates..... Application Deadline

January 14.....	December 17
February 11 .....	January 22
March 10 .....	February 18
April 14 .....	March 17
May 12.....	April 21
June 9 .....	May 19

### 2008 HCLC Meeting Dates..... Application Deadline

July 14 .....	June 16
August 11 .....	July 21
September 8 .....	August 18
October 13.....	September 15
November 10 .....	October 20
December 8 .....	November 17

### How does the COA process work?

#### **Step 1: Application**

Upon submission of the completed application, the item will be placed on the next scheduled Historic and Cultural Landmarks Commission (HCLC) meeting as a public hearing action item. Incomplete applications will not be accepted or forwarded to the HCLC for action.

#### **Step 2: Hearing**

The application shall be heard within 45 days after receipt of a completed application, or as soon thereafter as is reasonable. The HCLC may delay the hearing for a reasonable time if they find that all parties who have an interest in the structure or property are not present or that additional information is needed in order to evaluate such application. All persons or entities having an interest in the property, may appear at the hearing and be heard concerning the proposed work.

### How do I obtain the Historic Site Tax Exemption?

The Historic Site Tax Exemption (HSTE) involves a two-part process that requires approval by the HCLC and the City Council before the project is started, and final verification by the HCLC and the City Council upon completion of the project. The Tax Exemption will go into effect January 1<sup>st</sup> of the year following City Council verification. The Tax Exemption freezes the taxable ceiling of the land and improvements at the pre-renovation values for the purpose of assessing City of Fort Worth taxes. The exemption period is ten (10) years. Application to the Tarrant Appraisal District must be made by the property owner each year of the exemption.

Eligibility for the Tax Exemption requires that an investment equal to or greater than 30% of the assessed valuation of the improvements be spent on rehabilitation. The HCLC must approve all work requiring a Certificate of Appropriateness in advance. Work, which does not require a Certificate of Appropriateness, may be counted toward the investment up to five years after the expenditure with appropriate receipts. Please contact the Historic Preservation Officer for more information.

#### **Step 1: Partial Approval**

Upon submission of the completed application, the item will be placed as a public hearing action item on the next scheduled HCLC meeting. Incomplete applications will not be accepted or forwarded to the HCLC for action. Please see the HSTE page of the application for required documentation. Upon approval by the HCLC, your application will be forwarded to the City Council for action.

#### **Step 2: Verification**

Upon completion of the stabilization or rehabilitation project, the applicant shall return the documents listed on the HSTE page of the application to the HCLC for verification. If the verification of completion is favorable, the HCLC shall forward your application to the City Council for verification approval. Once verified, City staff notifies the Tarrant Appraisal District of the tax exemption to begin on January 1 of the following year.

If the verification of completion is unfavorable, you shall be required to complete the project in order to secure the HSTE; your application will be returned for consideration of approval after all work has been completed.



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## HISTORIC AND CULTURAL LANDMARKS COMMISSION

CITY OF FORT WORTH, TX 76102 1000 THROCKMORTON (817) 392-8012 / Fax: (817) 392-8016

### HISTORIC PROPERTY

Street & Number: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Legal Description: \_\_\_\_\_  
Lot Number Block Number Subdivision Name  
Zoning: \_\_\_\_ HSE (Highly Significant Endangered) \_\_\_\_ HC (Historic & Cultural Landmark) \_\_\_\_ DD (Demolition Delay)

### PROPERTY OWNER / AGENT

Owner's Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Street & Number: \_\_\_\_\_ Email: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Agent (if any): \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Street & Number: \_\_\_\_\_ Email: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### PROPOSED WORK

\_\_\_\_ Exterior Alteration \_\_\_\_\_ Relocation  
\_\_\_\_ Addition \_\_\_\_\_ Demolition (part or whole)  
\_\_\_\_ New Construction  
\_\_\_\_ Other \_\_\_\_\_ (please contact staff for specific requirements)

### ACKNOWLEDGEMENTS

I certify that the above information is correct and complete to the best of my knowledge and ability and that I am now or will be fully prepared to present the above application to the Historic and Cultural Landmarks Commission public hearing. I understand that if I am not present or represented at the public hearing, the Landmarks Commission may continue or disapprove/deny the application. I authorize members of the Landmarks Commission and officers of the city to visit and inspect the property.

I understand that in considering my application, the Commission determines whether the proposed work complies with the design guidelines for the "HC" Overlay District and The Secretary of the Interior's "Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings", and that copies of these will be furnished upon my request.

I understand that deviation from the Guidelines or Standards may be accepted by the Historic and Cultural Landmarks Commission based on a written statement explaining one or more of the following:

- Rationale why property is no longer historically, culturally, architecturally or archaeologically significant.
- Proof of economic hardship
- Rationale for why the proposed change is compatible with or will not affect an overlay district.

I understand that any owner dissatisfied with the action of the Commission regarding the issuance or denial of a Certificate of Appropriateness shall have the right to appeal to the Appeals Board within 10 calendar days after the Commission's decision. The appeal must be in writing and filed with the Historic Preservation Officer and the City Secretary.

I agree to provide any additional information necessary for determining eligibility as requested by the Planning Department, the Landmarks Commission or City Council.

Owner/Agent: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature

Case Number: \_\_\_\_\_

## SUPPLEMENTAL NOTICE OF CASE-RELATED INFORMATION

Approval of your case, by any City of Fort Worth Board or Commission, DOES NOT negate you from any other applicable requirements needed to obtain required Permits, Certificate of Appropriateness, or a Certificate of Occupancy. Any one or more of the following may require additional approvals:

- A. Review by '**Plans Examiners Division**' – Examines building development plans for a project.
- B. Review by '**Building Inspectors**' - for building code requirements.
- C. Execution of an **Encroachment Agreement** – Usually Downtown, and applies to signs and awnings encroaching public right-of-way.
- D. Encroachment into **Easements Release** - requires a letter of release from all affected public franchised utility companies, and should accompany applications. (Some Easements may require vacation.)
- E. **Transportation and Public Works** – Requirements for driveway permits, sidewalks, curbs, and gutters, Community Facility Agreements, etc.
- F. Review and approval by various City Boards and Commissions:
  - **Zoning Board of Adjustment** for Special Exceptions and Variances to the Zoning Ordinance
  - **Downtown Design Review Board**– Downtown Urban Design District ONLY.
  - **Historic and Cultural Landmarks Commission** – HSE, HC, DD, and Historic District designations – HCLC approval must be granted prior to Board of Adjustment Hearing.
  - **Construction Board of Appeals** – Regarding Building Code Standards (even if you meet all of the zoning ordinance requirements regarding setbacks, height, size, etc. are satisfied).
  - **Scenic Preservation and Design Review Commission** – Board of Adjustment must approve Special Exceptions and Variances regarding Telecommunications Towers, Stealth Towers, and Antenna before SPDRC Hearing for design review.
  - **City Plan Commission** - There may be subdivision platting issues requiring application and hearing before the Commission.
  - **City Zoning Commission** - There, may be zoning change issues requiring an application and hearing before the Commission and the City Council.

*Note: MOST BOARDS AND COMMISSIONS have a 30-Calendar Day Hearing cycle. This cycle enables the applicant to file a request for a hearing application 30 days BEFORE the date of the hearing.*

**IF NECESSARY, THE APPLICANT MUST OBTAIN A VARIANCE FROM THE BOARD OF ADJUSTMENTS IN ORDER TO COMPLY WITH THE DECISION OF THE HCLC. THE BOARD OF ADJUSTMENTS MUST APPROVE ALL NECESSARY VARIANCES BEFORE A CERTIFICATE OF APPROPRIATENESS OR BUILDING PERMITS WILL BE ISSUED.**

I, THE UNDERSIGN, HEREBY ACKNOWLEDGE THAT I FULLY UNDERSTAND THE INFORMATION CONTAINED HEREIN AND HAVE RECEIVED A COPY HEREOF.

\_\_\_\_\_  
OWNER/APPLICANT

\_\_\_\_\_  
DATE

Case Number: \_\_\_\_\_

## ALTERATIONS, REPLACEMENTS, & DEMOLITIONS

IF YOUR WORK IS NOT AN ALTERATION, REPLACEMENT OR DEMOLITION, PLEASE DO NOT FILL OUT THIS PORTION OF THE APPLICATION.

### DESCRIPTION OF WORK

Please describe in detail the work you intend to complete. If necessary, continue on an additional sheet. \_\_\_\_\_

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### REQUIRED DOCUMENTATION

Is your proposed work for;

\_\_\_\_\_ **In-Kind Replacement**

\_\_\_\_\_ **Exterior Alteration.** Please include the following with your application:

\_\_\_\_\_ Detailed description of proposed work

\_\_\_\_\_ Site Plan of the property. A copy of the site plan must be submitted in 8 1/2 x 11 inch format. **Site plans must include:**

- Scale, north arrow, and legal description with street address
- Location and dimensions of the lot(s) and adjacent lots that may be impacted or may provide a setback context
- Footprint of all existing and proposed structures with dimensions
- Location/ type of driveways with dimensions
- Location of building line and distance from property line for proposed and adjacent buildings.
- All building setbacks (front, rear, side, structure to structure)
- Alley location and dimensions (where applicable)
- Street names
- Sidewalk locations and dimensions

\_\_\_\_\_ Elevation drawings of the current and proposed changes (see above for site plan requirements).

\_\_\_\_\_ Photographs of the affected area – four elevations of the structure or property and adjacent structures or property

\_\_\_\_\_ Samples of materials to be used

\_\_\_\_\_ Architectural drawings

\_\_\_\_\_ Roof Plan

\_\_\_\_\_ **Demolition** Part or Whole (circle one)

\_\_\_\_\_ Structural reports to document the *reasons* for demolition

\_\_\_\_\_ Site Plan / Elevation drawings of the existing structure (see above for site plan requirements).

\_\_\_\_\_ Photographs of the affected area – four elevations of the structure or property and adjacent structures or property

\_\_\_\_\_ **Other** (please contact staff for specific requirements applicable to your case).

*Please note: Staff has the right to request any additional information necessary to make the appropriate recommendations.*

Case Number: \_\_\_\_\_

## NEW CONSTRUCTION & RELOCATIONS

IF YOUR WORK IS NOT NEW CONSTRUCTION OR A RELOCATION, PLEASE DO NOT FILL OUT THIS PORTION OF THE APPLICATION.

### DESCRIPTION OF WORK

Please describe in detail the work you intend to complete. If necessary, continue on an additional sheet. \_\_\_\_\_

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### REQUIRED DOCUMENTATION FOR NEW CONSTRUCTIONS AND RELOCATIONS

- \_\_\_\_\_ Detailed description of proposed work
- \_\_\_\_\_ Site Plan of the proposed construction. A copy of the site plan must be submitted in 8 1/2 x 11 inch format. **Site plans must include:**
  - Scale, north arrow, and legal description with street address
  - Location and dimensions of the lot(s) and adjacent lots that may be impacted or may provide a setback context
  - Footprint of all existing and proposed structures with dimensions
  - Location/ type of driveways with dimensions
  - Location of building line and distance from property line for proposed and adjacent buildings.
  - All building setbacks (front, rear, side, structure to structure)
  - Alley location and dimensions (where applicable)
  - Street names
  - Sidewalk locations and dimensions
- \_\_\_\_\_ Survey of the property
- \_\_\_\_\_ Elevations
- \_\_\_\_\_ Photographs of the affected area
- \_\_\_\_\_ Samples of materials to be used
- \_\_\_\_\_ Architectural drawings
- \_\_\_\_\_ Roof Plan

*Please note: Staff has the right to request any additional information necessary to make the appropriate recommendations.*

### STRUCTURE INFORMATION

Square footage of structure: \_\_\_\_\_  
Number of stories: \_\_\_\_\_  
Exterior building material: \_\_\_\_\_  
Window material: \_\_\_\_\_  
Roof material: \_\_\_\_\_

#### **If this is a relocation:**

The address where the structure is currently located: \_\_\_\_\_

Case Number: \_\_\_\_\_

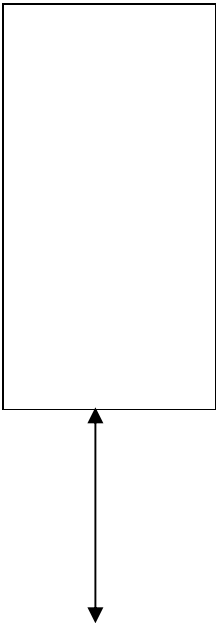
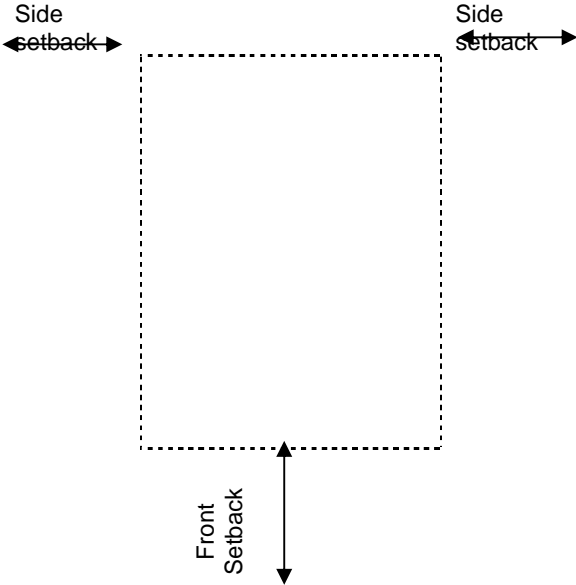
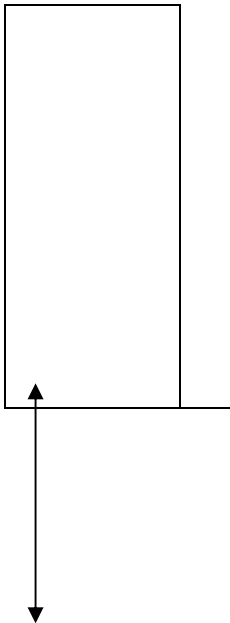
## NEW CONSTRUCTION & RELOCATIONS

IF YOUR WORK IS NOT NEW CONSTRUCTION OR A RELOCATION, PLEASE DO NOT FILL OUT THIS PORTION OF THE APPLICATION.

### SETBACKS

Please fill in the following information regarding setbacks. This document cannot be used as a substitute for a site plan.

Prior to the HCLC hearing, each new construction site will be visited by Staff and an inspector from the Development Department in order to measure setbacks. **IN ORDER TO CORRECTLY MEASURE, THE PROPERTY PINS MUST BE VISIBLE OR FLAGGED.** Applicants will be notified prior to the site visit. Property owners are not required to be present for the site visit.

		
Sidewalk		
Curb		
<b>NEXT ADJACENT LOT:</b> _____	<b>PROPERTY ADDRESS:</b> _____	<b>NEXT ADJACENT LOT:</b> _____
Neighboring setback:	Zoned:	Neighboring setback:
	Front Setback:	
	Right side yard setback:	
	Left yard setback:	
	Width of House:	
	Lot width:	

\* Setbacks are measured from the front property line not from the curb and are measured to the first vertical support of the structure.

**PLEASE NOTE: IF THE PROPERTY PINS ARE NOT MARKED ON THE SCHEDULED SITE VISIT DAY, THE CASE WILL BE CONTINUED UNTIL THE NEXT MONTH.**

Owner/Agent: \_\_\_\_\_ Date: \_\_\_\_\_

Case Number: \_\_\_\_\_

## HISTORIC SITE TAX EXEMPTION

IF YOU ARE NOT APPLYING FOR HSTE, PLEASE DO NOT FILL OUT THIS PORTION OF THE APPLICATION.

### PROJECT INFORMATION

Required 30% Expenditure \$ \_\_\_\_\_ Estimated Expenditures \$ \_\_\_\_\_

Projected Completion Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### REQUIRED DOCUMENTS WITH HSTE APPLICATION

- \_\_\_\_\_ Certificate of Appropriateness (completed application)
- \_\_\_\_\_ Proof of ownership or authorization to act on behalf of owner
- \_\_\_\_\_ Proof taxes are current
- \_\_\_\_\_ Project description
- \_\_\_\_\_ Statement of costs equal to or exceeding 30% of the improvements value
- \_\_\_\_\_ Photographs of current conditions
- \_\_\_\_\_ Signed application

### REQUIRED DOCUMENTS UPON COMPLETION OF HSTE WORK

- \_\_\_\_\_ Copies of all receipts for eligible project costs
- \_\_\_\_\_ Proof of final inspection by the Development Department
- \_\_\_\_\_ Proof that a Certificate of Occupancy has been issued (if applicable)
- \_\_\_\_\_ Photographs of finished project
- \_\_\_\_\_ Signed application

**NOTE:** Upon verification of the HSTE, a signed and notarized copy of the City of Fort Worth form "Notice of Historic Site Tax Exemption" shall be filed in the office of the Tarrant County Clerk before the City shall grant the HSTE.

### ACKNOWLEDGEMENTS

I certify that the above information is correct and complete to the best of my knowledge and ability and that I am now or will be fully prepared to present the above application to the Historic and Cultural Landmarks Commission public hearing. I understand that if I am not present or represented at the public hearing, the Landmarks Commission may continue or disapprove/deny the application. I authorize members of the Landmarks Commission and officers of the city to visit and inspect the property.

I understand that there are two steps to receiving the Historic Site Tax Exemption. The first step is submitting the Historic Site Tax Exemption and Certificate of Appropriateness applications to the Landmarks Commission prior to starting rehabilitation. I understand that required permits and inspections must be obtained from the Development Department. The second step in receiving the tax exemption occurs upon completion of the project. I am responsible for submitting the required documentation to the Planning Department for verification of the project's completion by the Landmarks Commission and the City Council.

I agree to provide any additional information necessary for determining eligibility as requested by the Planning Department, the Landmarks Commission or City Council.

\_\_\_\_\_  
Owner/Agent Signature

\_\_\_\_\_  
Date

Case Number: \_\_\_\_\_